



Sensormatic

by Johnson Controls

Comprehensive measure of
store customer traffic

Benchmark by UK nations,
location type and major cities

BRC-SENSORMATIC FOOTFALL MONITOR

October 2024

Period covered:

29 September 2024 – 26 October 2024

Headline commentary



Helen Dickinson OBE | Chief Executive | British Retail Consortium

“October’s footfall figures showed a marginal decline compared to last year, primarily due to half-term moving out of the comparison. Despite the decline, retail parks continued to attract shoppers, as they saw positive footfall growth for the third consecutive month. Across England, the northern towns performed best, with Leeds and Liverpool seeing positive footfall last month.

“Retailers have seen footfall consistently fall since the pandemic. Thriving high streets and town centres are not only good for local economies but also form a key part of the social fabric of communities up and down the country. With 6,000 stores closing in the past five years, retailers now need a policy environment that supports growth and investment.”



Andy Sumpter | Retail Consultant – EMEA | Sensormatic

“After the positive footfall performance we saw in September, October’s footfall dropped back into negative figures compared to the year before. While this will be disappointing for many retailers, who may have hoped the positive figures in September would spell the start of a more consistent uptick in store traffic, it perhaps shouldn’t come as a surprise.

“We expect to see a bumpy recovery as a myriad of market conditions - from the cost of living to shaky consumer confidence around the Budget - continue to make footfall performance volatile. Retailers now need to look ahead and focus their efforts on the rest of the Golden Quarter, delivering compelling reasons to visit in order to drive ambient footfall and sales during the key Christmas trading period.”

Executive Summary

October's modest decline in footfall reflects a period of relative stabilisation in retail traffic after a year marked by more significant fluctuations. Although footfall is down by 1.1% compared to last October, this smaller decline suggests that consumers may be adjusting their spending patterns rather than pulling back entirely, showing caution rather than a full pullback. This behaviour is likely due to a mix of the school half-term change, saving for upcoming holiday shopping, and ongoing economic worries such as inflation and increasing living costs.

Retail Footfall Index – October 2024

- Footfall down **1.1%** YoY
- Compared to September: Change in YoY footfall down by **4.4** percentage points
- Rolling 3-mth average: up **0.9%** YoY, but down 0.6 percentage points from Jul-Sep's average

down 1.1%
% change YoY

FOOTFALL BY SHOPPING LOCATION:

High Streets

- Oct-24: footfall down **3.6%** YoY
- Compared to prior month: Change in YoY footfall down by 4.5 percentage points

down 3.6%
% change YoY

Retail Parks

- Oct-24: footfall up **4.8%** YoY
- Compared to prior month: Change in YoY footfall down by 2.5 percentage points

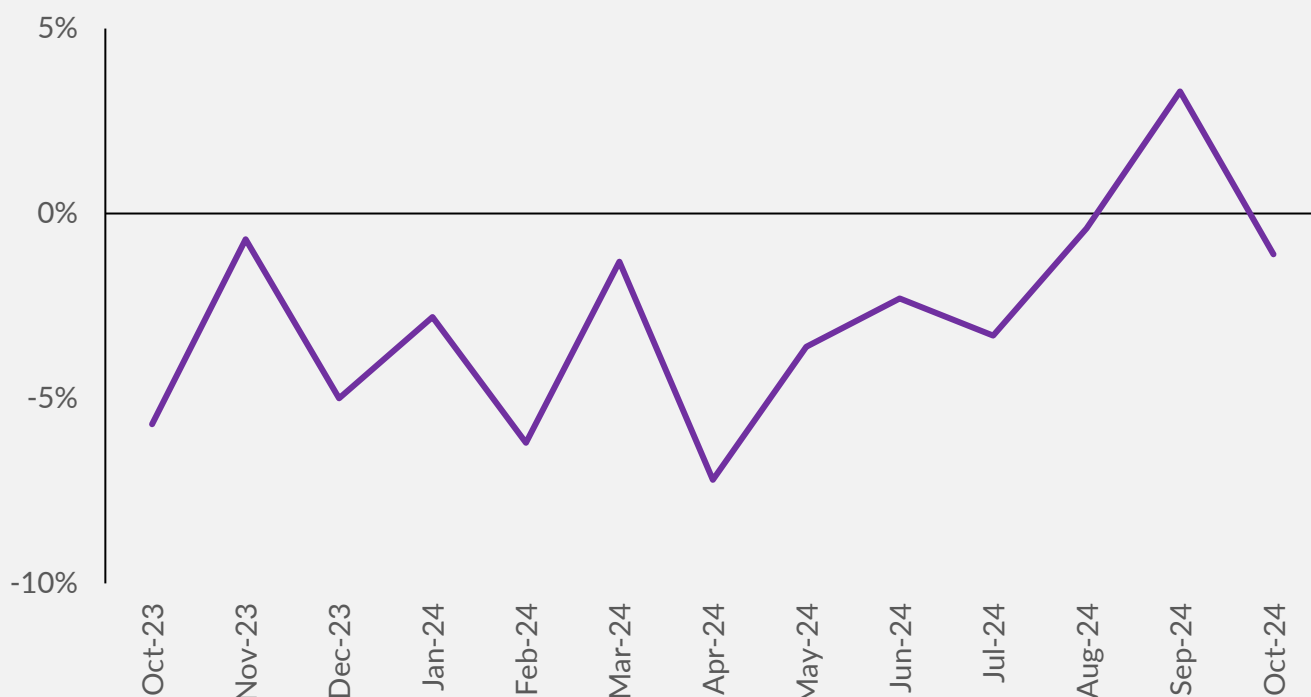
up 4.8%
% change YoY

Shopping Centres

- Oct-24: footfall down **1.6%** YoY
- Compared to prior month: Change in YoY footfall down by 3.9 percentage points

down 1.6%
% change YoY

MONTHLY TOTAL UK RETAIL FOOTFALL (% CHANGE YEAR-ON-YEAR)



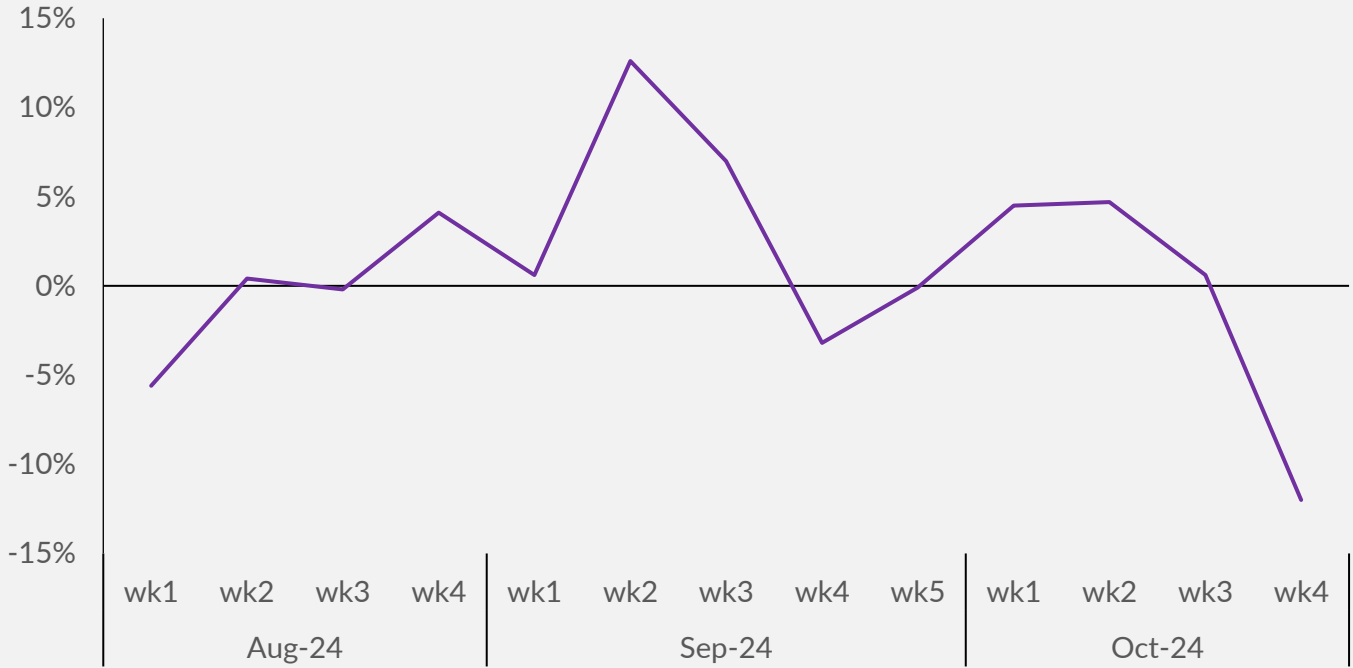
October's month YoY footfall returns to negative territory

- UK total retail footfall was down ↓1.1% YoY in October 2024
- This was down ↓4.4 percentage points (pp) compared to September 2024
- Key factors influencing footfall performance include:
 - October's footfall returned to negative territory indicating that September's growth was likely a temporary boost driven by seasonal factors. The decline may reflect a natural post-summer slowdown or renewed economic pressures affecting consumer activity.
- In summary, while there was a brief recovery in September, October's decline signals that footfall has yet to sustain a consistent positive trend, suggesting a fluctuating retail environment likely impacted by seasonality and broader economic conditions

UK Total Retail
Oct-24
down 1.1%
Year-on-Year

Aug-24 to Oct-24
[3-month rolling average]
up 0.9%
Year-on-Year

WEEKLY TOTAL UK RETAIL FOOTFALL (% CHANGE YEAR-ON-YEAR)



Last week of October sees a steep drop in YoY footfall

Wk1 (+4.5%)

- Increased YoY footfall.
- Potential influence of back-to-school shopping and seasonal events.

Wk2 (+4.7%)

- Continued growth.
- Possible attraction from public holidays or special in-store events.

Wk3 (+0.6%)

- Marginal growth suggests slowing momentum.
- Consumers may be tightening spending.

Wk4 (-12.0%)

- Significant decline in footfall, indicating a potential shift in consumer focus toward upcoming holiday sales.
- Possible influences include economic pressures and adverse weather.

OCT-24 TOP WEEK

Week Two

up 4.7%

Year-on-Year

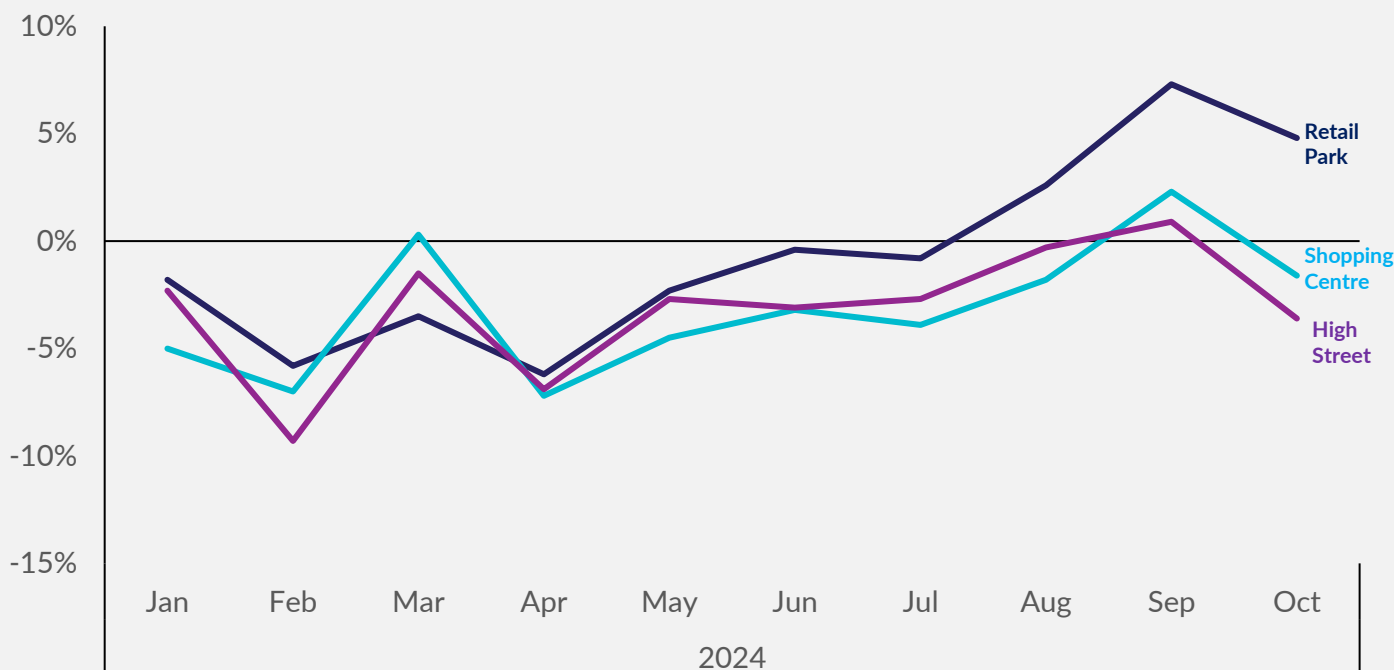
OCT-24 BOTTOM WEEK

Week Four

down 12%

Year-on-Year

FOOTFALL BY LOCATION (% CHANGE YEAR-ON-YEAR)



Of the three locations, Retail Parks remain in positive YoY territory

- **Retail Park:**
 - Footfall up $\uparrow 4.8\%$ compared to same mth, last yr
 - Compared to prior month YoY % change: down $\downarrow 2.5\text{pp}$
- **Shopping Centre:**
 - Footfall up $\downarrow 1.6\%$ compared to same mth, last yr
 - Compared to prior month YoY % change: down $\downarrow 3.9\text{pp}$
- **High Street:**
 - Footfall up $\downarrow 3.6\%$ compared to same mth, last yr
 - Compared to prior month YoY % change: down $\downarrow 4.5\text{pp}$

Footfall over 2024 thus far:

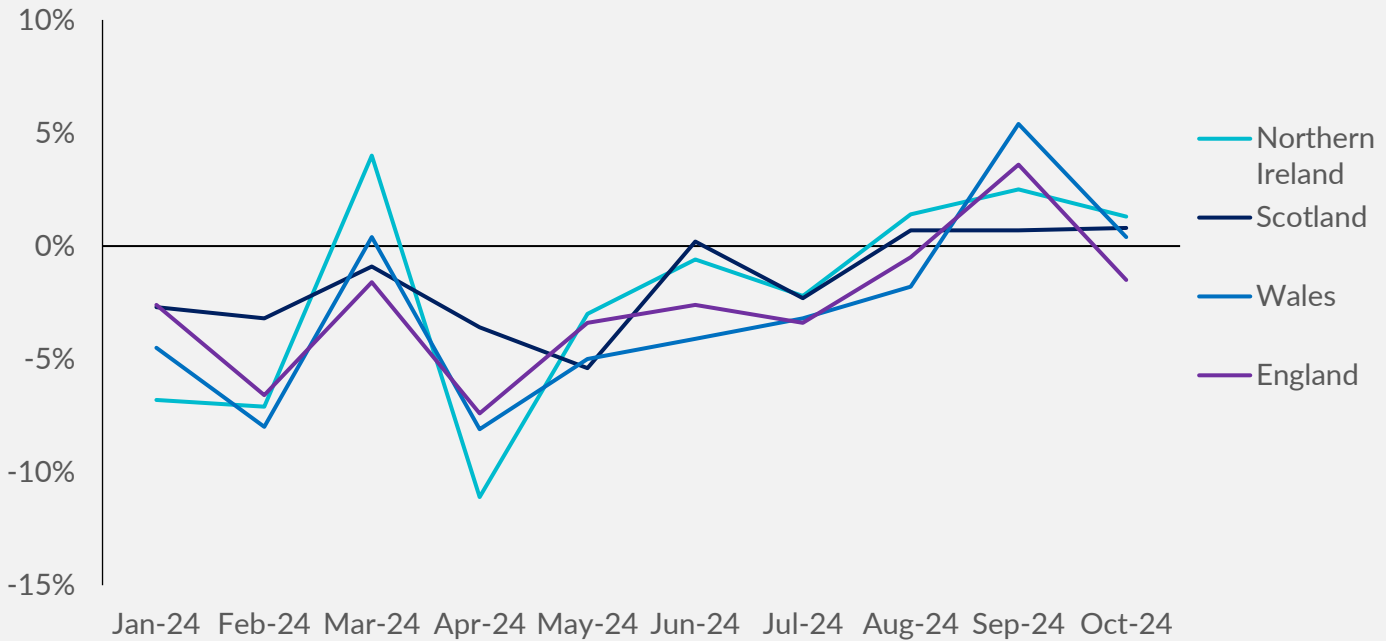
- **Retail Park:** After a slow start, footfall improved steadily from August, peaking in September and holding in October, showing stronger recovery than other locations.
- **Shopping Centre:** Footfall mostly declined, with sharp YoY drops in April and May; minor growth in March and September shows occasional, inconsistent improvement.
- **High Street:** Footfall largely declined in 2024, with sharp YoY drops in February and April; only September showed slight growth, indicating limited recovery.

Retail Park
up **4.8%**
Year-on-Year

Shopping Centre
down **1.6%**
Year-on-Year

High Street
down **3.6%**
Year-on-Year

NATIONAL FOOTFALL (% CHANGE YEAR-ON-YEAR)



UK NATIONS

Northern Ireland:

- Footfall up $\uparrow 1.3\%$ compared to same mth, last yr
- Compared to prior month YoY % change: down $\downarrow 1.2\text{pp}$
- Comparing nations, NI has ranked top for 3 out of the last 4 months

Footfall Country Rank (YoY)



Scotland:

- Footfall up $\uparrow 0.8\%$ compared to same mth, last yr
- Compared to prior month YoY % change: down $\uparrow 0.1\text{pp}$
- Second place and best performance since September 2023



Wales:

- Footfall up $\uparrow 0.4\%$ compared to same mth, last yr
- Compared to prior month YoY % change: down $\downarrow 5.0\text{pp}$
- Excluding prior month, best YoY improvement since Mar-24



England:

- Footfall up $\downarrow 1.5\%$ compared to same mth, last yr
- Compared to prior month YoY % change: down $\downarrow 5.1\text{pp}$
- Excluding prior month, England monthly YoY has been in negative territory since Jul-23



TOTAL FOOTFALL BY REGION (% CHANGE YEAR-ON-YEAR)

	Oct-24	Sep-24	Oct-24 rank	Sep-24 rank	Rank Change
West Midlands	+1.5%	+3.0%	1	9	↑8
Northern Ireland	+1.3%	+2.5%	2	10	↑8
North West England	+1.0%	+4.7%	3	4	↑1
Scotland	+0.8%	+0.7%	4	13	↑9
Wales	+0.4%	+5.4%	5	1	↓-4
East Midlands	+0.3%	+3.6%	6	7	↑1
Yorkshire and the Hu	-0.5%	+4.2%	7	6	↓-1
England	-1.5%	+3.6%	8	7	↓-1
East of England	-1.8%	+4.7%	9	3	↓-6
South East England	-2.1%	+5.2%	10	2	↓-8
London	-2.5%	+2.5%	11	10	↓-1
North East England	-3.6%	+1.1%	12	12	→0
South West England	-5.0%	+4.6%	13	5	↓-8

ENGLISH REGIONAL RANKINGS

Highest YoY: West Midlands

- Footfall up ↑1.5% compared to same mth, last yr
- Compared to prior month YoY % change: down ↓1.5pp
- Second time to top the table this year (the first being in January)

Highest YoY
West Midlands
down 1.5%

Lowest YoY: South West England

- Footfall down ↓5.0% compared to same mth, last yr
- Compared to prior month YoY % change: down ↓9.6pp
- Last ranked at the bottom of the table in Jul-24

Lowest YoY
SW England
up 5.0%

	Oct-24	Sep-24	Oct-24 rank	Sep-24 rank	Rank Change
Leeds	+1.8%	+6.9%	1	1	→ 0
Glasgow	+1.6%	-1.0%	2	11	↑ 9
Liverpool	+1.3%	+1.8%	3	9	↑ 6
Edinburgh	+1.0%	+2.8%	4	6	↑ 2
Cardiff	0.0%	+3.9%	5	3	↓ -2
Manchester	-0.1%	+3.4%	6	5	↓ -1
Birmingham	-0.1%	-0.1%	7	10	↑ 3
Nottingham	-0.4%	+2.6%	8	7	↓ -1
Belfast	-0.6%	+3.7%	9	4	↓ -5
London	-2.5%	+2.5%	10	8	↓ -2
Bristol	-7.7%	+5.0%	11	2	↓ -9

UK CITIES RANKINGS

Major Cities:

- Major City Average: down ↓0.5% YoY
- Compared to prior month Major City Avg YoY change: footfall down ↓3.4pp
- While the city average has returned to negative YoY territory, this is the second strongest average recorded since Mar-24

City: Best YoY change

Leeds

- Footfall up ↑1.8% compared to same mth, last yr
- Compared to prior month YoY % change: down ↓5.1pp
- Top of the table for the second consecutive month.

City: Worst YoY change

Bristol

- Footfall down ↓7.7% compared to same mth, last yr
- Compared to prior month YoY % change: down ↓12.7pp
- Bottom of the table for the second time in four months

Best YoY Improvement

Leeds

up 1.8%

Worst YoY Fall

Bristol

down 7.7%

THE BRC & SENSORMATIC

Together with the BRC and its members, Sensormatic has worked to develop the most representative and robust indicator of UK store footfall traffic available – providing retailers with confidence to rely on the data for their business decision making.

[Sensormatic](#), the leading global retail technology portfolio from Johnson Controls, is the UK's market leader in in-store footfall measurement. Its index delivers insights based on input from more than 1.5 million data collection devices in the retail marketplace and 40 billion shopper visits captured by the Sensormatic brand each year.

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